



MANAGING FOR EXCELLENCE:
How do we stack up?



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Managing for Excellence: How do we stack up?

At The Community Foundation for Greater Atlanta, we connect people to the issues and organizations making a difference in our region. We are experts on the characteristics of highly effective nonprofits as well as the critical issues in our 23-county region, and we believe that by working with donors, nonprofits, community leaders and other funders we can change our communities for the better through philanthropy.

For the past 25 years, The Community Foundation has been rewarding strong and effective management at nonprofit organizations through not only our grantmaking, but also through our annual Managing for Excellence Award. This coveted award acknowledges the importance of effective management in the nonprofit field and how that focus on strong operations ultimately helps a nonprofit achieve its mission.

The application process is quite competitive – it includes two rounds of extensive applications as well as a thorough interview process with both staff and board. The decision is always a hard one given the multiple strong nonprofits that apply. But in the end, there is only one nonprofit that receives our Managing for Excellence Award.

After 25 years of giving this award, we at The Community Foundation decided to turn the tables. What if we applied for our own award? Are we as strong and effective as those nonprofits we review for investment? How do we measure up? So this year our annual report will take a different format. Instead of the traditional reporting on programs and services, we are going to take a deep look at how we work as an organization, and report to you about how we stack up.

This year we are moving up the release date of our annual report to provide you information about the previous year in a more timely manner. Because of this, our fully audited financials will no longer be included in our annual report since the audit is not complete until end of third quarter the following year. We will share those audited numbers with you once they are released, and in the meantime we share with you our estimated numbers for 2009.

Highlights of the Year

\$116 million given to The Community Foundation to build a permanent charitable resource for the Atlanta region

\$554,854 awarded to **166 individuals** through scholarships for education

More than **\$140 million** in grants awarded to nonprofit and faith-based organizations regionally, nationally and internationally – a new record for The Community Foundation

819 nonprofits received support through our competitive grantmaking

5,168 grants provided to nonprofits across 23 counties

40 new funds were created at The Community Foundation

More than **280 volunteers** were engaged through advisory committees at The Community Foundation

\$651 million total assets under our management for the region

7 rank among nation's largest community foundations in total gifts received

16 rank among nation's largest community foundation by asset size

10 rank among nation's largest community foundations in grantmaking



More than 20 years ago a young man was looking for a way to help and support a group of ailing friends.

They were too sick to cook for themselves, and desperately needed nutritious meals. So he pulled together a few of his neighbors, and this small, grassroots group began their commitment to helping others in need in their community. Today, that group now provides more than 4,500 home-delivered meals and nutrition education to help people prevent and better manage chronic disease. As the winner of our 2009 Managing for Excellence Award, Open Hand represents how excellent management helps nonprofits adapt to change. What began as a source of support to friends in need at the start of the AIDS epidemic has become a nationally recognized nonprofit organization empowering individuals to live healthier, more productive lives.

The need for smart and effective management among nonprofits has become even more essential in economic times like today. While it seems that our economy and our communities are at least in somewhat of a holding pattern, many are still waiting for the other shoe to drop. The demand for service from nonprofits isn't slowing down, but our state's demand to balance our budget means less support for those nonprofits and ultimately less help for our neighbors in need. Many individuals, corporations and foundations have reduced their giving as well as they cautiously wait out what remains of the storm. Fortunately, The Community Foundation and our donors stepped up to the plate in 2009, and together, we made a record amount of grants totaling more than \$140 million to nonprofits locally, nationally and internationally.

But many nonprofits are still left competing for support from a smaller and smaller pot of funding sources. That makes it even more critical for an organization to recognize the importance of excellent management. So what exactly does it mean to "manage for excellence"? Is it about having a strong board or volunteer engagement? What about community outreach through marketing or effective resource development? How important is fiscal responsibility and transparency? At The Community Foundation, we believe strong nonprofits excel in each of these areas and deserve both reward and recognition. When we started the Managing for



Excellence Award 25 years ago, we wanted to put a spotlight on those organizations doing smart effective work in our region and having a significant impact on our quality of life.

To determine a potential winner, the volunteers and staff members of the award's advisory board conduct an exhaustive review of applicants identifying more than 80 specific characteristics of well-managed organizations. It's an extensive process that requires organizations to fully recognize their strengths and areas that need improvement within overall operations. Since we began the Managing for Excellence Award, more than 500 nonprofit organizations have participated, and many nonprofits point to the importance of the self-evaluation as they look for ways their organizations can improve.

This year, The Community Foundation decided to celebrate 25 years of the Managing for Excellence Award by turning the tables and filling out our own application. It was a learning experience for us as we looked closely at our full operations. You'll see in the following pages that there are specific areas where we thrive – collaboration, planning, fiscal management – while there are also areas needing improvement – donor diversity, volunteer recognition, Board involvement in resource development.

We will take these learnings to heart, just as many of our nonprofit partners have when participating in this award process. As a community foundation, we believe that we must hold ourselves to the highest level of transparency and accountability when serving as a trusted philanthropic resource for donors and investing in nonprofits and community solutions. We are committed to strengthening the region's nonprofits, and that starts right here with us.

Michael Z. Kay *Alicia Philipp*

Mission. The Community Foundation for Greater Atlanta strengthens our region by providing quality services to donors and innovative leadership on community issues.

History

In 1951, Atlanta's four largest banks – Citizens & Southern National, First National Bank of Atlanta, Fulton National Bank and Trust Company of Georgia – came together to create The Metropolitan Foundation of Atlanta. As one of the earliest community foundations in the Southeast, the Foundation was established to serve as a permanent charitable resource to benefit and improve quality of life in the metropolitan Atlanta region. Administered by trustees and distribution committee, the Foundation gave more than \$450,000 in grants to nonprofits during that first year.

In 1977, The Metropolitan Atlanta Community Foundation was created as a corporate entity with \$7 million in assets. Over the next 15 years the Foundation partnered with corporate and community leaders to launch the Atlanta AIDS Partnership Fund, the Metropolitan Atlanta Arts Fund and the Neighborhood Fund. By the early 1990s, the Foundation had also laid the groundwork for what would later become the Atlanta Women's Foundation and the Georgia Center for Nonprofits. By 2000, our assets had increased to \$334 million, and giving by the Foundation and our donors reached more than \$25 million annually.

To date, The Community Foundation for Greater Atlanta (formally renamed in 1997) has worked with donors to create nearly 30 competitive scholarship funds; supported local leadership to develop Local Funds across the metro Atlanta region; established the Center for Family Philanthropy to support the unique needs of deeply engaged individuals and families; and spearheaded multiple community initiatives to address critical issues such as youth in foster care, environmental sustainability and healthy eating and active living. Over the years, we have also increased our focus on personalized service and support to donors and have developed engagement opportunities to help guide and strengthen their philanthropy.

Today, we are one of the largest community foundations in the country working with more than 650 individual funds and several supporting organizations ranging in net asset size from \$2 million to \$128 million. Together with our donors, we averaged more than \$95 million in grants annually over the past 5 years to an estimated 2,000 local, national and international nonprofit organizations.

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What does our organization do?

The Community Foundation helps people make smart philanthropic investments. By connecting donors, nonprofits and community leaders, we create resources and solutions to some of our communities' most pressing issues. Working together, we strengthen philanthropy in our 23-county region leading to a better quality of life for all who live here.

WE ENGAGE OUR COMMUNITY

by providing extensive services to individuals and families interested in learning more about critical issues in our community and the nonprofit organizations making an impact on those issues.

WE STRENGTHEN NONPROFITS IN OUR REGION

through financial support of grants as well as targeted professional development opportunities to increase their ability to manage effectively.

WE ADVANCE PUBLIC WILL

by bringing community leaders, partners and others to a neutral table to discuss critical issues in our region and how we can approach those issues with a collaborative effort that encompasses many voices.

WE PRACTICE ORGANIZATIONAL EXCELLENCE

by building a permanent charitable resource for our region and focusing on the internal strength of our staff, board and volunteers.

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Neighborhood Fund grantee



Piedmont Park

Vision. To be the most trusted resource for growing philanthropy to improve communities throughout the Atlanta region.

OUR TOP 3 PROGRAMS

Philanthropic Services

At The Community Foundation we work directly with individual and family donors to learn more about their values and what makes them passionate about giving, and we connect that passion to strong nonprofit organizations doing effective work.

Our knowledgeable staff provides expert advice on the issues in our region, the nonprofits making an impact on those issues and strategies for planning philanthropy. In 2009 we introduced two new donor engagement series to provide more timely information for our donors. *Impact Philanthropy* provides an overview of a critical issue in our region and recommends specific nonprofits making an impact on that issue. While our first piece focused on crisis assistance, the subsequent piece highlighted the impacts of the recession on arts and culture. We also introduced *Give Well* – a series focusing on the multiple giving approaches donors can consider when investing in a nonprofit. These include support for general operations, nonprofit effectiveness, research and analysis, specific programs and civic engagement/advocacy.

By providing this kind of insight, we are able to better engage our donors and their giving. In 2009 The Community Foundation granted more than \$140 million to nonprofit and faith-based organizations – a new record – and more than 80% of those grants were made through individual and family donors and their donor-advised funds.

Our job is to engage more individuals and families in giving so they are able to leave a legacy for our communities. This can be done through current giving or through a future planned gift. To learn more about the ways a donor can give with The Community Foundation, please visit our website at www.cfgreateratlanta.org.

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youth participate in Planet Philanthropy



young donors gather at NextGen event

In 2009 The Community Foundation granted more than \$140 million to nonprofit and faith-based organizations – a new record

Myrtle Davis

Board Chair, Carefree Fund

Myrtle Davis knows what it takes to build healthy communities. As past president of Kiwanis Club of Atlanta, former Atlanta city councilmember and former president of the Georgia Municipal Association, she has been a committed civil and public figure in Atlanta for decades. Davis, who also served on The Community Foundation's Board of Directors, is the current advisory committee chair for the Carefree Fund at The Community Foundation.

Founded more than 10 years ago, the Carefree Fund was established by the late Fred Barnett Jr., to address the greatest personal needs of individuals, reflective of St. Jude, patron saint of hopeless causes. Twice a year, the Carefree Fund advisory committee meets to make grants to organizations responding to basic and essential human needs. Since 1999, The Community Foundation has worked with Carefree to distribute more than \$3.5 million in grants.

"We have come to depend on the expertise of The Community Foundation to shape our grantmaking. It's impossible for people who don't work directly with nonprofits or extensively in community development to understand the greatest needs out there – and the capacity of organizations to tackle them. The Foundation has gone through the process of reviewing organizations and has the knowledge to help us make smart investments in the nonprofits we choose to support.



"Last year was a prime example of the value of the Foundation's community knowledge. In response to the difficult economic times, we made three unsolicited grants totaling \$50,000 to nonprofits the Foundation had recommended as high performing and making a difference for families in need. In addition, during our second grant cycle, we provided grants to several organizations that we hadn't traditionally funded. We trusted The Community Foundation had done its homework and that our dollars would be put to good use.

"Each grant cycle, we are faced with more and more nonprofits in need of support as cuts in government funding and other grant dollars continue. Now more than ever, we need to make smart decisions about the organizations we fund. That's where the help of a philanthropic partner like The Community Foundation comes in."

"We have come to depend on the expertise of The Community Foundation to shape our grantmaking."

Grantmaking

The Community Foundation provides grants to support and strengthen nonprofits in our 23-county region and beyond. In 2009, The Community Foundation prioritized support for general operations and nonprofit effectiveness in our competitive grantmaking programs.

This unrestricted financial support gives the nonprofit more flexibility to determine where and how to invest the dollars. At the same time, this shift has required us to have a better understanding of the whole organization when considering funding instead of simply focusing on a singular program. To provide this kind of unrestricted support, our staff needs to have a thorough understanding of the operations of the organization, from staff diversity to board involvement to community outreach.

For those organizations that need additional help in one of these management areas, we provide nonfinancial grants focused on nonprofit effectiveness. These could include a Toolbox award that focuses on management consulting support, or it could be a Nonprofit Scholarship allowing an individual to access professional development opportunities.

We also streamlined the application process for nonprofits moving to a letter of intent as the initial starting point for funding. This has not only saved more time for nonprofits filling out applications, but it has also saved more time for our staff to focus in on those nonprofits most likely to receive support from us.

These improvements in our grantmaking have supported one of our key goals – strengthening nonprofits in our region. To learn more about receiving grants and support from The Community Foundation, please visit our website at www.cfgreateratlanta.org.

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The Joseph Sams School



Mableton Improvement Coalition

This unrestricted financial support gives the nonprofit more flexibility to determine where and how to invest the dollars.

Emily Ellison

Literacy Action

Serving more than 600 students each year, Literacy Action provides free classroom instruction and job-readiness services for adults with low literacy skills. In metro Atlanta alone, nearly 800,000 adults are considered “functionally illiterate”. Like many other nonprofits in the Atlanta region, Literacy Action has been facing a significant increase in demand for services over the last two years. And as more individuals continue to struggle with unemployment or underemployment, executive director Emily Ellison is leading Literacy Action to help provide those clients with education, counseling and connections.

“Demand for our services is at an all-time high because low-literate adults are the first to lose their jobs during a recession and the last to be rehired. We’ve changed our intake system to add new students more frequently and increased class offerings, including Saturday sessions and off-site classes at partner organizations. And we’ve functionally changed some of the ways we operate to be even more efficient.

“Last March we made the critical decision not to cut services to clients and therefore proactively began making significant changes to our operations. We cut full-time staff by nearly half to work as part-time staff and also trimmed hours of other staff. We were forced to cut professional development from the budget completely, but were able to significantly increase professional development through pro-bono assistance from groups like The Southern Company, which provided us with an organizational audit and training for our leadership team, and Georgia State University, which provided advanced training for our classroom instructors.”



While demand for services from Literacy Action continues to increase, finding the funding to support these services can be challenging in today’s economy. Earlier this year, Literacy Action received one of The Community Foundation’s first round of general operating support grants from our Common Good Funds. This type of investment allowed the organization to determine how and where to spend it.

“When I learned about The Community Foundation prioritizing general operating support, I thought it was wonderful that they stepped up to provide leadership in this philanthropic approach. They recognized how the needs of those they’re supporting have changed dramatically in this economic climate, and it was an extremely wise and strategic shift. As a partner in this work, we don’t want to have to come up with budgets that might meet a specific funding priority but that don’t move the needle or serve our operational goals. We want to be honest and clear about what we need and how we work, and receiving this kind of general operating support has allowed us to do that. I think The Community Foundation is leading the way for other foundations to be equally thoughtful about their investments in nonprofits.”

“[The Community Foundation] recognized how the needs of those they’re supporting have changed dramatically in this economic climate, and it was an

Community Initiatives

We believe that philanthropy is about more than financial investments – it requires leadership and a willingness to work with others toward a shared goal. At The Community Foundation that takes shape in our multiple community initiatives. While each initiative is focused on a different issue and brings a unique set of voices to the table, the common question is the same – how can we bring together the many positive assets in our communities to make an even greater impact on a singular issue?

We work with other national and local foundations, nonprofit organizations, government entities, individual philanthropists and community leaders to tackle critical issues together. The role we play varies with each initiative whether we work as a grantmaker, knowledge broker or convener. Each issue and each collaboration requires a unique approach.

In 2009 our more than 20 years of experience with the Neighborhood Fund came into play as we worked with the Civic League to hold our region's first ever Neighborhood Summit. Nearly 500 metro Atlanta neighborhood and community leaders, activists and members gathered in September to learn from each other and discuss issues of mutual interest and importance. They attended workshops covering everything from shaping a vision for your community to advancing neighborhoods with technology to creating civic organizations that last to lobbying and advocacy. Angela Glover Blackwell, founder and CEO of Policy Link, served as keynote speaker for the event and focused on the importance of sharing good ideas and local solutions.

This kind of civic engagement is critical to helping individuals find connections across communities in our region. To learn more about our community initiatives, please visit our website at www.cfgreateratlanta.org.

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Neighborhood Summit participants



community leaders share ideas

Philanthropy requires leadership and a willingness to work with others toward a shared goal.

Dobson Harris

Mableton Improvement Coalition

When Dobson Harris learned about the Atlanta region's first ever Neighborhood Summit, he signed up immediately. As a board member of the Mableton Improvement Coalition and a grantee of The Community Foundation's Neighborhood Fund, Harris has been actively involved in neighborhood and community improvements and was eager to share his experience and learn from others.

"No one in the Atlanta region has ever done something like this – bringing all the neighborhoods and nonprofits in those neighborhoods together for a day of learning information and discussing ideas. It was such a unique opportunity to have really engaged people find out what's going on throughout the region and see if some of the ideas could be put into effect in our own neighborhoods."

Harris is no stranger to community activism. His work with the Mableton Improvement Coalition has led the organization from a small group of concerned residents fighting a development to one that now encompasses a broader mission of supporting a community that is both attractive to prospective residents and a place where current residents want to stay. At the 2009 Neighborhood Summit, Harris led a presentation titled *Getting Organized for Lobbying and Advocacy Efforts* focused on how to work with policymakers on community issues.

"If you don't take self action in your neighborhood and where you live, many things don't get done. It's important to know the real strength a neighborhood coalition has in the overall quality of life that you live every day. With the Neighborhood



Summit, we had a forum for these types of organizations to come together to find out what's new, what works and what doesn't work to improve how I can change my community.

"After I did my presentation on advocacy and getting organized in Mableton, so many people came up to me and said, 'I don't know where to start. How did you get involved in Cobb? Were they receptive to you?' All of these individuals were here to find out how to get involved in our community and many times that's inter-related with the government. Many people just don't know where to begin when it comes to building relationships with government officials. It takes work, but people who are dedicated find they can have great results.

"In Mableton, we had a tough go at in the beginning. It took years for us to get respect from the local, state and federal government. But once you get your local government on board, you can really springboard that into a larger partnership. If you want to reach that goal for your community, never give up because it's not going to happen overnight, but it will happen."

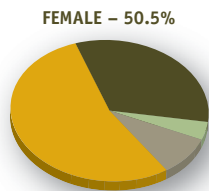
"No one in the Atlanta region has ever done something like this – bringing all the neighborhoods and nonprofits in those neighborhoods together for a day of learning information and discussing ideas."

Population Served

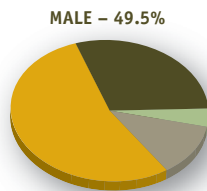
As a place-based funder, The Community Foundation for Greater Atlanta focuses on improving the 23-county region of metro Atlanta. Our work is not targeted toward a specific population but toward the larger population of our entire region and the issues that affect us all.

At the same time, one of the main ways we increase those philanthropic investments into our region is by working directly with individual and family donors. With their help, we are able to make a more significant impact in our region through increased investments in nonprofits. Therefore we have offered two sources of information for the population we serve – the overall population for our 23-county region as well as our individual and family donors.

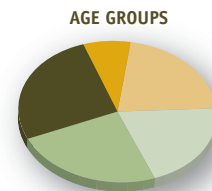
23-COUNTY REGION POPULATION



● African American or Black	16.5%
● Asian or Pacific Islander	2.1%
● Latino	4.6%
● White	27.3%



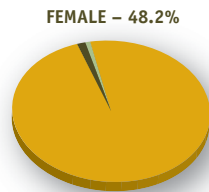
● African American or Black	14.6%
● Asian or Pacific Islander	2.1%
● Latino	6%
● White	26.8%



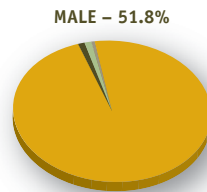
● Young Children (0-4)	7.8%
● Children and Youth (5-19)	21.4%
● Young Adult (20-34)	20.5%
● Adults (35-49)	24.1%
● 50 and over	26.2%

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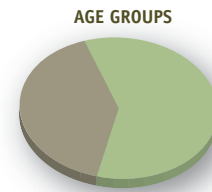
DONORS OF THE COMMUNITY FOUNDATION POPULATION



● African American or Black	.8%
● Asian or Pacific Islander	.4%
● Latino	0%
● White	47%



● African American or Black	.7%
● Asian or Pacific Islander	.5%
● Latino	.3%
● White	50.3%



● Youth (0-18)	0.2%
● Adults (19-63)	59.2%
● Elderly (64+)	40.6%





Number of People Served

As a funder we serve people in multiple ways, and our investments in nonprofits and communities lead to a broad impact. Consequently, we have broken the categories down into our donors, total nonprofits and the general population of our 23-county region as people served by The Community Foundation.

	Donors	General Population	Nonprofits
Barrow	4	70,073	151
Bartow	1	94,913	218
Butts	2	24,423	78
Carroll	3	113,688	363
Cherokee	2	210,529	533
Clayton	5	273,718	834
Cobb	55	698,158	2,538
Coweta	0	122,924	329
DeKalb	86	739,956	2,520
Douglas	1	127,932	350
Fayette	15	106,465	593
Forsyth	12	168,060	371
Fulton	385	1,014,932	8,733
Gwinnett	41	789,499	2,473
Hall	6	184,814	484
Henry	2	191,502	642
Morgan	8	18,491	97
Newton	14	98,542	261
Paulding	1	133,135	218
Pickens	1	31,176	103
Rockdale	1	83,222	367
Spalding	3	63,913	248
Walton	1	85,813	247
Other county	37		
Other state	78		
TOTAL	764	5,445,878	22,751

27.6% of the total nonprofits served are located in the City of Atlanta

10.0% of the total people served live in the City of Atlanta

Governance

The Community Foundation is governed by an 18-member voluntary Board of Directors. These dedicated individuals provide strategic direction for the organization and ultimately approve all grants given by the Foundation. They help us focus on evaluation of our impact as a community foundation and where we are making a difference in our region. In 2009 we were fortunate to add Suzanne Boas, Ken Britt, Debbie Ellis, Bob Jimenez and The Honorable Ronit Walker and to our Board. We thank Lynn Wentworth who rotated off our Board this year and are excited to continue to work with her as chair of our Nonprofit Loan Fund advisory committee.

Date bylaws were originally adopted (m/d/yy):	10/27/77
Has the board reviewed and updated the bylaws?	Yes
If Yes, when did the board approve the most recent update?(m/d/yy)	05/17/96

	Board	Executive Committee or Officers
Current number of members:	18	5
Minimum number required by your bylaws:	18	3
Maximum number allowed by your bylaws	18	No max.
Number of regularly scheduled meetings each year:	4	3
Number of members that constitute a quorum:	1/3	1/3
Number of regularly scheduled meetings in board year 2008 with a quorum:	4	3
Average attendance at all 2008 board meetings:	80%	100%
Length of a board member's term in years:	5	3
Number of consecutive terms a board member may serve	1	1
Total number of board members who have served longer than four consecutive years or two consecutive terms (whichever is less), as specified by bylaws:	5	0
Total number of consecutive years the board member with the longest tenure has served:	6	3

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Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
A file or official record book is maintained for board meeting minutes.			✓
Board members have written job descriptions.			✓
Collectively, the board has all of the skills needed to successfully lead the organization.			✓
Policy and procedures are in place to ensure diversity in the board membership.			✓
Expectations of board members are in writing.			✓
Former clients or individuals who can represent the interests of clients are on the board.			✓
The organization has a conflict of interest policy that is signed by board members.			✓
The board reviews its performance as a board on an annual basis.	✓		

What are several specific and important responsibilities of the Board of directors?

- Provide directional guidance relating to the best ways to meet The Community Foundation's mission and success measures.
- Exercise responsibility and appropriate oversight of Foundation activities and fiscal management.
- Participate regularly in board meetings, Foundation activities and events, and committee and task force meetings.
- Actively promote The Community Foundation and its mission.
- Hire and evaluate Foundation president.

How do you hold Board members accountable to fulfill their responsibilities, become appropriately involved, and avoid conflict of interest problems?

Our bylaws provide a clear outline in terms of commitment and attendance accountability. We also have a conflict of interest policy that is signed and acknowledged separately by each Board member.

Dr. Beverly Tatum

Board member

As the ninth president of Spelman College, Dr. Beverly Daniel Tatum is an enthusiastic believer in the power of education. Since 2002 her leadership has pushed Spelman forward to be recognized as one of the leading liberal arts colleges in the nation as well as one of the most selective women's colleges. Tatum is also widely recognized as a scholar, teacher, race relations expert and leader in higher education and is actively involved in our Atlanta community. When she joined The Community Foundation's Board of Directors in 2008, she was eager to serve on our Community Partnerships committee to learn more about our direct impact on issues and organizations in the Atlanta region. In this sense, the relationship has been a shared one in which The Community Foundation benefits from Tatum's leadership, and she benefits from our knowledge of the community. The education process is full circle, which fits naturally with Tatum's passion.

"I think education has the power to transform lives, so I'm interested in education at all levels. Of course, I'm a college president and passionate about Spelman, but education can happen in many ways at many stages of life. Recently, I served as co-chair on the Early Education Commission of United Way focused on improving access to education for young children ages zero through kindergarten and beyond. Working with other community leaders and experts on issues like this has been a way for me to participate in making a broader impact on our region."

To Tatum, this kind of leadership is essential in healthy communities. It's what brings different voices to the table and helps create collaborative solutions that can truly make an impact.

"I believe that anyone in my position – and by that I mean not just a college president, but anyone who has had the benefit of a lot of education and material comfort – should use those resources to help others. As they say, 'to whom much is given, much is expected.' Being an engaged and active leader in your community is a critical way to be empowered and to make a difference in the lives of others.



"I joined The Community Foundation's Board after meeting Alicia Philipp through Atlanta's Rotary. I had led a workshop for the Center for Effective Philanthropy about issues of race in the board room and in the world of philanthropy. We discussed the incredible importance of board diversity as a necessary part of board effectiveness, and that foundations must connect their social change missions to the way they structure their organizations. Alicia attended this workshop and approached me about the work and leadership of The Community Foundation. I appreciate the efforts of the Foundation and wanted to support someone who is a strong leader. Plus, as a relative newcomer to the Atlanta region I recognized the chance to learn more about the great work that was being done in the nonprofit community.

"Since joining The Community Foundation's Board, I have had the opportunity to get to know the other Board members, which is a plus, but also I've benefitted from the discussions about organizations supported by the Foundation and the incredible impact they've had in the region. What has been particularly enlightening and interesting to me is not so much about a specific grantee – though of course there are wonderful organizations being supported – but really I've been impressed by the opportunities The Community Foundation has to enhance the capacity of organizations, whether that's just through the questions we're asking in terms of how we're making an impact or whether it's taking a leadership role with a community initiative. I think this is incredibly important today, because we live in a time of limited resources, and we want to be sure that the resources we have are being used to the best effect. It's clear this is a strategic focus of the Foundation's work."

"Being an engaged and active leader in your community is a critical way to be empowered"

Fiscal Management

As a trusted steward of a permanent charitable resource for the Atlanta region, The Community Foundation places a strong emphasis on fiscal management.

While 2008 was an incredibly challenging year with our total assets down 19% and The Community Foundation's pooled investments down 24%, 2009 proved to be much stronger. The Foundation Pool finished the year with a net-of-fee return of 26% and exceeded its established market benchmark and that of the median U.S. community foundation by 2 percentage points.

We attribute this success not only to the overall market recovery, but also to our consistent strategy employed by our Investment Committee and Colonial Consulting, our independent consultant. With their guidance, our investments focus on long-term prospects, portfolio diversification and strategic asset allocation.

To ensure The Community Foundation exists in perpetuity for the greater good of our region, we elect a spending policy each year for grant distributions from our designated, field-of-interest, scholarship and unrestricted funds. Our goal is to balance the need for financial grants into our community with the need to ensure our existence for future critical issues. As a result, each year we approve a new spending policy that takes these ideas into consideration. In 2009, the Board approved a spending policy for grants based on granting 5.2% of the 12-quarter average of fund balances. While our Board could have considered a very conservative policy to protect the assets of The Community Foundation, they recognized the pressing needs in our communities during the recession and elected to maintain rather than decrease our spend rate. This was a bold move on the part of our Board, particularly given the fact that many other private and community foundations chose to decrease grant amounts. The ultimate result was an additional \$7 million into the community to strengthen nonprofits during incredibly demanding times.

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Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Organization prepares and adheres to an annual balanced budget for operations.			✓
Organization's budget reflects its annual priorities.			✓
Board approves the budget.			✓
Board receives reports comparing budgeted vs. actual balances at least once each quarter.			✓
Board has a finance committee, which meets at least quarterly and reviews agency budget and interim financial statements.			✓
Organization has an annual independent financial audit that conforms to generally accepted accounting principles (GAAP) OR has certified financial statements that conform to GAAP.			✓
Board receives, reviews and responds to the management letter prepared by the auditor or independent financial reviewer in compliance with GAAP.			✓
Board follows up on any corrective action that needs to be taken as a result of management letter.			✓
Organization has sufficient cash to meet current obligations.			✓
Organization periodically assesses the amount of high liability risk and implements appropriate measures to manage such risk.			✓
Organization's management and board review information on program expenses on a regular basis.			✓

*Our current fiscal year began on January 1, 2010 and will end on December 31, 2010 and we refer to this as our fiscal year 2010.

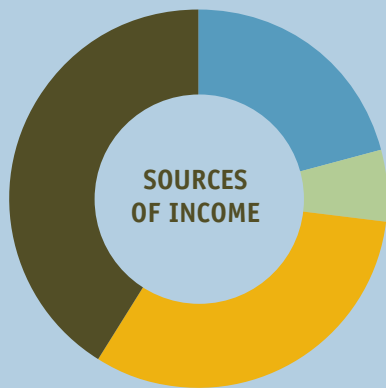
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HISTORIC SUMMARY INCOME STATEMENT

Please see our financial summary on page 42 of the annual report.

Does the organization have a policy concerning the amount of reserves?	yes
What are the reserves for? (ex. Operating)? (50 characters).	The policy requires the Foundation to have a reserve equal to 50% or more of annual expenses.
Board approved:	Yes
Date of Board Action:	June 11, 2008
Do you have an audit for the most recently completed fiscal year?	Yes, 2008 is available at the Foundation's website and the 2009 audit is currently in process with expected reports available in September of 2010.

BELOW ARE THE COMMUNITY FOUNDATION'S SOURCES OF INCOME IN MILLIONS FOR THE LAST COMPLETED FISCAL YEAR.



REVENUE SOURCE	TOTAL	% OF TOTAL REVENUE
Individuals	\$40.8	21%
United Way	0.2	0%
State, County and Local Government	0.1	0%
Businesses/Corporations	12.2	6%
Foundations	62.4	32%
Investment revenue	77.6	40%
Ticket Sales/Admissions	0.2	0%
Rentals	0.9	0%
Special events	(0.4)	0%
Other (specify): Sponsors	0.1	0%
Other (specify): Administrative	0.1	0%
Total:	\$194.2	100%

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the Elaine Clark Center



attendees at our Annual Meeting

Fund Development

At The Community Foundation we are able to do our work because of the individual donors and other funders who invest in us and support our efforts. We serve as an advisor to these donors and funders helping connect their dollars to issues and organizations in the Atlanta region.

When donors set up a fund with us, they are doing so because they want to create a long-term plan for their giving and have their dollars invested to grow over time. When funders invest with us, they are looking for the best way to make a local impact with an organization that has a deep knowledge of issues in our communities. Together, these financial investments in The Community Foundation translate to more dollars to more nonprofits in our region.

Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Resource development plan is in place that reflects organization's mission and goals and that will generate the funds needed to be effective.			√
Organization has a funding strategy with goals from diverse sources such as earned income, government sources, United Way (if appropriate), foundations, corporations, individuals and events.			√
Board is involved in setting annual fundraising goals and reviewing progress on a regular basis.*			
Organization achieved its resource development goals in its last completed fiscal year.*			
Board recognizes the role it must play in resource development and is actively engaged.		√	
Organization tracks donors and how much they give.			√
Organization acknowledges all donors.			√
Organization provides letters to donors indicating the cost and tax deductible portions of certain contributions, like special events and some memberships.			√

* Not applicable

As a community foundation, we do not set up specific fundraising goals because we aren't fundraising in the traditional sense. We work with individuals and families interested in setting up long-term philanthropic investments. Therefore we do not have a dollar mark we're trying to hit each year.

While our resource development isn't set up in the same way as many nonprofits, we do have specific approaches to encourage individuals and families to work with us in making smart philanthropic investments. We focus on three specific areas:

- **Engaging and cultivating professional advisors** – we offer The Community Foundation as a resource for advisors to tap for tax and other financial planning and charitable giving solutions for their clients who currently do not have funds at the Foundation.
- **Maintaining and deepening relationships with existing individual donors to The Community Foundation** – we help our donors to be more effective and engaged philanthropists while investing in nonprofits in our communities through their funds and encouraging them to add to their funds over time.
- **Developing and cultivating relationships with non-traditional donor prospect groups** – we pursue opportunities to connect with various ethnic, age-based, geographically-dispersed, etc. populations to create a more diverse donor base.

The key focus of our resource development model is developing long-term relationships. By working directly with professional advisors, existing donors and donor prospects, we position The Community Foundation as a trusted philanthropic advisor to individuals with a desire to invest in their communities.

Evonne Yancey

Funder, Kaiser Permanente

Partnering with other funders is essential in The Community Foundation's work. We recognize that philanthropic solutions aren't created by one individual or one organization but by multiple diverse voices and areas of expertise. Kaiser Permanente has been a critical expert and partner with our effort to support healthy communities throughout our region. Kaiser Permanente recognizes that every community comes with its own individual health needs, and that The Community Foundation can connect at a very local level to ensure resident and community input about those needs.

Over the years Kaiser Permanente has collaborated through our work on Health Safety Net Providers, HIV/AIDS, Healthy Belvedere and our most recent effort mapping the needs across our region and the nonprofits providing support for those needs. The health care provider has invested \$1,650,000 toward healthy communities through its Fund for Community Benefit at The Community Foundation, including \$500,000 in 2009. When speaking with Evonne Yancey, Kaiser Permanente's director of community benefit and community relations, the organization's ultimate goal becomes clear.

"Our vision for Georgia is simple – we want to see significant improvement in our state's health status. Right now we are at the bottom ten in most health rankings, whether it's obesity, infectious disease, infant mortality or one of the social determinants of health such as education, air quality or lack of insurance. If we can start making headway with our programs to improve health, we can effectively improve lives.

"A healthy community requires people to be aware of their environment and how it affects their overall quality of life. From sidewalks to food stores to community gardens to exercise programs – each of these can significantly impact the healthy eating and active living habits of community members. We want people to improve their health by taking personal responsibility for their own actions and then becoming advocates for the broader community.



The Community Foundation has helped Kaiser become more connected to these local communities and to the individuals and organizations working to improve quality of life. For Yancey, this partnership has been a natural collaboration that has helped both organizations and those they serve.

"We believe in teaming up with like-minded partners to expand our reach. There is a natural synergy between the work of The Community Foundation and our Community Benefit work at Kaiser Permanente. The Community Foundation brings resources, provides broad community knowledge and helps foster collaborations that strengthen what we do."

The partnership between Kaiser Permanente and The Community Foundation increases our abilities to reach more people, more effectively. And Yancey has seen the power of this partnership in the very lives of the individuals who work with us.

"Recently, we provided a small grant to a Belvedere resident so she could start an exercise program for the community. She was a long-time Grady Hospital employee who retired early due to an illness. When she learned about Healthy Belvedere, she decided she had experience she could share and wanted to give back to her community. The small grant allowed her to bring her exercise program to a group of Belvedere residents. When I first learned about this resident and her program, I thought, 'wow – this is a small amount of money going a very long way to help people in Belvedere live healthier.' This woman's illness may have caused early retirement, but she was still able and willing to give back. She saw the bigger vision of improving the health of her community and found a way to help achieve it. That is what Healthy Belvedere is all about – building a healthier community through personal commitment and involvement."

"We believe in collaborating with like-minded partners to expand our reach, so there's a natural synergy between what

Woody (Albert) Woodroof

Donor with The Community Foundation

Individuals interested in charitable giving can accomplish their goals in a variety of ways. They may give directly to a nonprofit, give through an investment institution or even establish a foundation of their own. Donors who choose to give through The Community Foundation for Greater Atlanta express multiple reasons for doing so, including our grantmaking expertise, community knowledge and quality services. For Woody Woodroof, The Community Foundation provided the convenience and flexibility he needed in a charitable vehicle.

Four years ago, the Woodroof family set up four donor-advised funds at The Community Foundation after the sale of their company, Spectrum Stores. “We didn’t have a family foundation so we needed a way for multiple individuals to give. At the same time, we all had differing charitable ideas, many undeveloped, so that was necessary to

consider as well. While it was a good time to establish a fund tax-wise, we were still developing our philanthropic interests and what organizations we wanted to support.

“We met with Foundation staff and discussed how The Community Foundation could provide the services we needed. It was important that everyone be able to make their own decisions regarding which nonprofits to support. We also wanted the flexibility of waiting to recommend grants when we were ready. The desire to give was certainly there but we needed time to let our ideas develop, identify our interests and discover how we could connect them to our giving.

“After learning more about the Foundation, we felt it was a good fit for us. Each family could give as they saw fit and take our time in identifying organizations. What’s more, funds are pooled and invested so they grow over time, providing us more resources with which to make a difference. The Community Foundation offered us the right amount of flexibility and leeway. I was also impressed with the staff and knew from reputation they were a well-run organization. For us, it’s been a good investment.

“I’ve always felt if you are fortunate to be able to give, you should. When the time came for us to approach charitable giving at a deeper level, The Community Foundation was there to help us figure out how to do that. We like that we can approach philanthropy in a way that’s right for us and are given the freedom to learn and grow along the way. Because we live in different places, have different interests and all view giving a little differently, it’s great to have a resource like the Foundation. It’s simple, flexible and adapts to fit your individual needs.”

“Each family could give as they saw fit and take our time in identifying organizations.”





Planning

In 2008 The Community Foundation went through a significant learning and planning process that helped us better understand how to serve our region. We didn't change who we were as an organization – we focused on our areas of strength and worked to improve them. The result was our Philanthropic Framework focusing on four key goals: engaging our community, strengthening our region's nonprofits, advancing public will and practicing organizational excellence.

Throughout 2009 we focused on the implementation of this framework and moving the plan from paper to our day-to-day work with our partners. Several of those accomplishments are mentioned throughout this report including our shift to general operating support, our broader sharing of information with donors and our focus on new uses of technology.

As we improve our work with donors, nonprofits and community leaders, we also focus on measuring success in those areas. While we have measures in place that determine our own success as an organization, we are also working on community indicators that measure the changes we wish to see in our region. So much of our work requires collaboration with and investment from others. Our community indicators will take that level of partnership into greater consideration as we begin to measure results throughout the region.

Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Organization establishes an annual plan and objectives consistent with the strategic plan.			✓
Planning takes into account and provides for procurement of resources necessary to achieve objectives.			✓
Board monitors progress toward objectives outlined in strategic plan.			✓
Consumer/client input is considered in the planning process.		✓	
Board regularly reviews progress toward the annual objectives and is involved in making changes as necessary.		✓	

Volunteers

A critical component of philanthropy is not just financial investments but intellectual investments as well. At The Community Foundation, we rely on the skills of more than 280 volunteers committed to various aspects of our work. They may be donors, other funders, community leaders, staff from nonprofit organizations or others who are interested in working with individuals toward a common goal on a critical issue. These volunteers act as ambassadors, advocates and thought leaders on behalf of The Community Foundation by helping to identify potential strong partnerships, provide guidance on community issues and assist in leveraging resources that advance the work of the Foundation.

Each of our community initiatives is led by an advisory board of committed volunteers, whether it's the Neighborhood Fund, Grants to Green or the Arts Fund as well as each of our local funds in Fayette, Clayton, Morgan and Newton. We rely on their passion, knowledge and relationships to help inform our approach to the many critical issues in our Atlanta region. In addition, we've also created an advisory board for professional advisors focused on charitable giving through the Planned Giving Advisory Board. We are incredibly appreciative of these volunteers and the many ways they strengthen our work.

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Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Organization uses volunteers to expand and enhance services.			✓
Organization provides orientation, training and supervision for volunteers.			✓
Volunteers have written job descriptions.			✓
Organization has a volunteer recognition program.	✓		
Organization evaluates and provides feedback to volunteers.	✓		



True Colors Theatre



DeKalb Habitat for Humanity

We rely on the skills of more than 280 volunteers committed to various aspects of our work.

Robert Terrell

Morgan Fund Advisory Board

For Robert Terrell, Morgan County is home and community engagement is second nature. In his civic life, he has served on numerous boards at the local, state and national levels. In his professional life, he is out in the community interacting with farmers and residents, as vice president of the timber company his grandfather began in 1944. In his personal life, he is a pastor, a man of the people and an individual who cares deeply for his community.

Terrell has served on the Morgan Fund's advisory board since 2004, and is one of the fund's longest standing board members. The Morgan Fund connects nonprofits, donors and community leaders to improve quality of life in Morgan County. Born and raised in Madison, he has seen the local community change by leaps and bounds from the place he remembers as a child. However, Terrell says more recent changes in Morgan County, shifts he's seen since serving on the board of the Morgan Fund, have been just as transformative.

"Just a few years ago I would attend public meetings and know everyone in the room. Now I might not even know half. While our growth has been more conservative than some of our neighbors, we have grown larger and stronger. But at the same time, we've kept the historic feel of the place.

"Since my time with the Morgan Fund, I've seen the advisory board and the nonprofit sector transform. When the board first began, most of the members were green. I didn't really know the process for applying for a grant, what a strong nonprofit looked like or how important operations and governance were to an organization's vitality. But over time, my knowledge has increased and we as a board have been able to better support nonprofits as a result. The Community Foundation has been a great supporter, helping us identify local issues and giving us the tools to bring together donors, nonprofits, the public and private sectors to solve these problems.

"It feels good to see how much stronger the nonprofit sector has become over the years. In the beginning, it was helping them secure proper status and keep track of documentation and records. Then it was coaching them on submitting a strong grant



application. The applications we received in the beginning were rough. But through seminars and trainings coordinated by The Community Foundation and the Morgan Fund, nonprofits have become more knowledgeable and effective. I've seen nonprofits that weren't approved for a grant come back in subsequent years and secure a grant. It's amazing to see how much they've improved."

Terrell's contributions to Morgan County have made him a respected leader in the community. Yet the most fulfilling part of his work doesn't come with the title of board member, vice president or pastor. For Terrell, being out in the community meeting the people, hearing their stories of challenge but also success, and discussing how they can work together is what his service is all about.

"Giving back and empowering the community has always been my goal. I believe charity starts at home and making sure your local community is taken care of is what's most important. While the times may change, these things don't change. That passion and engagement is what brings residents together to create strong communities. Being that bridge between nonprofits that are doing the work and donors who want to support that work is a role I have always taken pride in," he says. "There's great opportunity ahead as we continue to grow as a community. The needs will increase certainly. But I'm confident the Morgan Fund will be there to bring the resources together to get the job done."

Human Resources

Our staff and our Board are invaluable assets at The Community Foundation. With their knowledge, passion and leadership, we are able to strengthen philanthropy throughout our 23-county region.

COMPOSITION OF BOARD OF DIRECTORS

The Community Foundation Board is comprised of diverse individuals representing both those we serve directly – donors and nonprofits – as well as those we serve in the larger region – business and community leaders, policymakers and others. While we believe diversity of ethnicity and gender are critical, we also believe diversity of geographic location, profession, religion and age are important as well. We serve a 23-county region that has many differing viewpoints and communities, so we work to make sure that is well represented.

COMPOSITION OF THE OFFICERS

Board Officers	Females	Males	Total
African American or Black	1	2	3
Asian or Pacific Islander	0	0	0
Latino	0	1	1
White	4	10	14
Total	5	13	18

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COMPOSITION OF THE EXECUTIVE COMMITTEE

Executive Committee Members	Females	Males	Total
African American or Black	0	1	1
Asian or Pacific Islander	0	0	0
Latino	0	0	0
White	0	4	4
Total	0	5	5





COMPOSITION OF THE ENTIRE STAFF

The Community Foundation staff is made up of 30 full-time individuals working in our Philanthropic Services, Community Partnerships, Finance & Operations and Marketing & Communications departments. While each department has its distinct role within the organization, much of the work we do requires the support and knowledge across departments to be successful.

Number of full-time staff: 30; part-time staff: 0; consultants/contractors: 5; volunteers: more than 200

Staff	Females	Males	Total
African American or Black	15	2	17
Asian or Pacific Islander	1	0	1
Latino	1	0	1
White	8	3	11
Total	25	5	30

COMPOSITION OF SENIOR MANAGEMENT

Number of full-time staff: 4; part-time staff: 0; consultants/contractors: 0; volunteers: 0

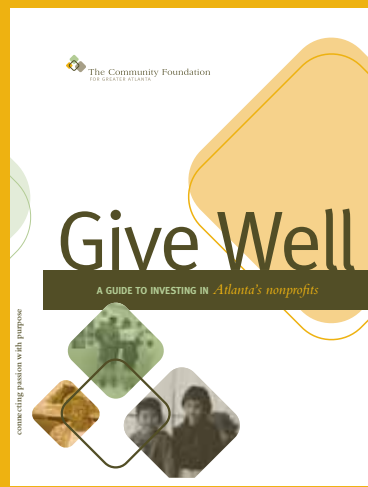
Senior Management	Females	Males	Total
African American or Black	1	0	1
Asian or Pacific Islander	0	0	0
Latino	0	0	0
White	2	1	3
Total	3	1	4

Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Organization has written personnel policies that are distributed to all staff.			✓
Organization has job descriptions for each position.			✓
All staff, including the executive director, receive annual written performance reviews that include a personal conference with the supervisor.			✓
Staff has necessary education, experience, and certifications needed to perform their duties well.			✓
Professional development opportunities, either internal or external, are available to all staff every year.			✓
The organization conducts an assessment of salaries and benefits at least every three years to determine appropriate levels.			✓
Salaries are within range of community norms based on recent research.			✓
Staff meetings are held regularly.			✓
Organization has a written diversity policy.			✓

Marketing & Communications

Building awareness of The Community Foundation's vision and value among our target audiences helps individuals and organizations understand how we can help them strengthen their philanthropy. We share stories of our work with donors, nonprofits, community leaders and others through print and online materials as well as through in person gatherings. Our goal is to share the extensive knowledge we have built over the years about effective giving, strong nonprofits and critical community issues.

Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Organization has a public relations plan and process in place.			✓
Plan supports the annual and long-range goals of the organization.			✓
Organization has a clearly stated policy on how it presents consumers to the public in speeches, publications, and other media, including strategies to protect consumer privacy and confidentiality.	✓		
Organization has release forms for consumers for public exposure or participation in a public event.		✓	
Organization has appropriate materials for use in public relations and marketing.			✓
Organization regularly assesses the market relative to competitors, client need and satisfaction.			✓
Organization is actively "branding" itself.			✓



Operations

While the internal operation of The Community Foundation is not typically the most familiar side of our work, it is just as important. We recognize that donors will only invest in us if they see us as a highly effective organization focused on smart management.

TECHNOLOGY

The world of technology is constantly changing, and at The Community Foundation we continue to look for new ways to use technology to improve our work. In 2009 we worked with an outside consultant to create an organizational technology plan focused on increased use of technology for staff as well as community constituents.

Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Organization has an integrated hardware and software system.			✓
Organization has a technology and information infrastructure that supports operations and planning.			✓
Staff has skills to effectively use the information technology system.			✓
Organization has a plan and system for repair and regular upgrade of software and hardware.			✓
Adequate financial resources have been committed for technology.			✓

FACILITIES

The Community Foundation is located in downtown Atlanta in the Hurt Building, a recently recognized LEED certified building. We work closely with Hurt Building management to provide a safe, secure and energy efficient workplace.

Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
The organization provides a safe environment for consumers and employees that meets Americans with Disabilities standards.			✓
Organization has current compliance permits with local fire, safety, health and sanitation and regulatory bodies.			✓
Organization has current and adequate insurance coverage to protect against fire, theft, personal injury or liability.			✓
Organization's mission, program needs, and managerial and financial capacity guide facility decisions.			✓
Organization integrates long-term facilities planning and decision-making into its overall long-term strategic planning.			✓
Organization has financial systems, policies and resources that enable it to assess, plan for and control facilities-related costs in the short and long term.			✓
Organization has an operating and maintenance plan for its facility and hires and trains competent people to maintain the facility.			✓
Organization has a plan to make facilities more energy efficient and/or more "green".			✓

Collaboration

As a community foundation, collaboration is a key component of our work. We work with other nonprofits, funders, individual donors, government groups and more to create shared approaches to critical issues in our region. Whether it's supporting the environmental sustainability of nonprofits through Grants to Green, creating better health outcomes for community members through Healthy Belvedere or strengthening small and mid-sized arts organization through the Arts Fund, our community initiatives are a vital way we are engaged in improving our 23-county region.

Each partnership is different because each issue is different, but we do have some general criteria we review to guide us in the potential development of initiatives. When considering an initiative we work with our Board to ensure that the work aligns with The Community Foundation's mission and values, is important and value-added and will be implemented in ways that benefit the region. Our Board and staff also rely on careful analyses of community trends and issues, appropriate research and data, and frequent convening of nonprofit professionals, civic leaders and others to determine our role.

Characteristic	No	Adopted Within the Last 2 Years	Adopted More Than 2 Years Ago
Organization has established collaborative relationships with other organizations in the community, and these relationships have been in place for more than one year			✓
These relationships involve significant activities, which may include working together to establish common goals, pooling resources, joint planning, implementing and evaluating services, and evaluating services and procedures			✓
These relationships are guided by an executed Memorandum of Agreement or other document			✓

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VOX teen newspaper



DeKalb Symphony Orchestra

We work with other nonprofits, funders, individual donors, government groups and more to create shared approaches to critical issues in our region.

The Healthy Belvedere Initiative

Of the critical issues facing our community, health and wellness remains a central concern. Poor dietary behaviors and sedentary lifestyles have contributed to adverse health and chronic illness for individuals, families and neighborhoods throughout our region. Five years ago, Kaiser Permanente approached The Community Foundation as a local partner to bring its Healthy Communities Initiative to metro Atlanta. By partnering with Kaiser, the Foundation was able to contribute our expertise in community engagement to Kaiser's focus on environmental and policy change. As a result, we helped create the Healthy Belvedere initiative – a partnership between the public, private and nonprofit sectors to promote healthy eating and acting living in DeKalb County's Belvedere community.

Since 2007, Healthy Belvedere has funded and supported close to 30 community-led programs through its small grants program. Grants have allowed residents to create walk/run clubs, a youth basketball camp, cooking classes, as well as facilitate health screenings and health education. Through its large grants program, Healthy Belvedere provided nearly \$50,000 in funding last year to support several significant initiatives including the inaugural Healthy Eating Active Living (HEAL) Summer Camp, a safe-routes-to-school program, a training program for wellness advocates and a community garden.

More than a dozen partners have contributed to the vision, direction and implementation of Healthy Belvedere. In fact, this cohort of community stakeholders representing local government, faith-based institutions, civic and private entities and most significantly Belvedere residents, developed the initiative's Community Action Plan, which has guided its grantmaking and community engagement work. "From the beginning, Healthy Belvedere has been led and owned by the community," says Andy Huff, a resident and president of the White Oak Hills Neighborhood Association. "Behind any major successes, you'll see a strong group of partners working together to bring about change," says Huff who has worked extensively with the initiative.

"The strategies we've put into place have allowed individuals to participate at whatever level is right for them," he says. "Not everyone is going to be an



advocate, so we've had to think about what programs and activities would bring visibility to Healthy Belvedere and allow residents to get involved and excited. The community garden is a great example of a project that has helped us build a sense of community and establish those connections," says Huff.

This April, more than 70 Belvedere residents and community leaders gathered to celebrate the grand opening of the Belvedere Community Garden, aimed at making fresh, locally grown fruits and vegetables accessible in the neighborhood. The idea for the garden began with two concerned residents and has grown into a partnership with Georgia Organics, Atlanta Community Food Bank, the University of Georgia's Cooperative Extension, Peace Lutheran Church and a host of other local partners. The community garden and each of Healthy Belvedere's programs demonstrates how important collaboration has been to the initiative's success.

"Whether it's been Wal-Mart supporting our HEAL Summer Camp, the board of health helping ministers promote healthy living in the churches or neighborhood groups coordinating walking clubs, the community has come together to make improvements," says Gwen Morton, a Belvedere resident, Belvedere Civic Club member and initiative co-investor. "When you have more people involved, the results are often more immediate and more long-term. Seeing the community come together to talk about the issues we're facing has been great. Because in the end, it's more than a community garden or walking club; it's getting people out, engaged and working together to make our community better."

Well, what do we need to do differently?

Each year nonprofit organizations from across our region fill out the Managing for Excellence application hoping to be rewarded with both the name recognition and the \$25,000 grant. But they also discover along the way that by simply completing this application, they can begin to recognize areas of strength and areas that need improvement in their organization.

The Community Foundation is no exception. We knew when we filled out this application that it would point out areas in our organization that need improvement or a new perspective. Below are several of those areas as well as approaches we are taking to change them:

The Community Foundation has a huge opportunity to diversify our donor base.

Currently, the vast majority of our donors are white. We recognize that this is certainly not reflective of our Atlanta region, but it is reflective of the methods we use to find donors. More than 90% of our new donors come in each year through relationships with professional advisors. While advisors have been incredibly helpful in making those connections to individuals and families interested in philanthropy, they are one path to reaching potential donors, and The Community Foundation is currently exploring other paths to diversify not just ethnicity among our donors but age and geography as well. As a staff we are working individually, and collectively, to learn about a broader cross-section of our community, and to cultivate relationships over time that can turn into prospective, and ultimately current, diverse donors. We are also deliberately spending additional time in the 23 counties of our service area to learn more about and develop deeper relationships with the individuals who reside across our region. Finally, we are exploring innovative approaches to philanthropy that appeal to younger donors as well.

While our organization is not a traditional fundraiser, we can create more specific resource development goals and involve our Board more in setting these goals to ensure we are reviewing progress on a regular basis.

As a community foundation, we are adamant that we do not want to serve as competition to the very nonprofit organizations we support. At the same time, we do have a responsibility to this community to continue to grow a permanent charitable resource that will serve the long-term crit-

resource development based on donors who choose to keep giving to their fund as well as the number of new donors who create funds each year. Moving forward, The Community Foundation will work with our Board to create more specific annual resource development goals that focus on what we hope to achieve each year with individual and family philanthropists.

We will clarify the Board's role in resource development and encourage more organized and consistent engagement.

Many nonprofits work directly with board members to reach out to other potential donors who might be willing to give a one-time gift. Because we do not raise individual donations at our Foundation, we have not involved our Board in our resource development and instead allowed it to grow organically. Several Board members have referred potential donors to The Community Foundation, but we have not made this a high priority. The members of our Board are incredibly knowledgeable, well-respected individuals in our communities, and we will work more closely with them to consider other potential donors and funders for The Community Foundation.

We will work with our Board to create an annual review of their performance each year.

We currently work with our Board members to ensure they are learning about issues in our region and nonprofits making a difference, but we have not traditionally asked the Board to evaluate their own work. Creating this type of review will help us clarify roles and responsibilities and provide feedback to

We will ensure that our Board of Directors as well as the Executive Committee are more diverse and reflective of our region.

At The Community Foundation we continually strive to represent the region we serve. We ensure that those specific audiences we serve (donors, non-profits, community leaders and professional advisors) receive representation on our Board so their voice is included in our approach to our work. We also consider variations in age, gender, ethnicity, faith, geography and expertise as critical to a diverse Board. As indicated in this year's report, our current Board needs to have more diversity reflected in ethnicity and gender. Our governance committee is charged with nominating potential new Board members, and we will stress this as a goal for the coming year. Diversity in our leadership is essential, and we will commit to making progress in this area.

We will create a clearly stated policy about how we present consumers to the public in speeches, publications and other media, including strategies to protect consumer privacy and confidentiality.

While we do have privacy policies for our donors, we do not have a stated policy about how we communicate about our donors. We have traditionally contacted individual donors requesting they share their story to ensure we are respecting their privacy. Moving forward The Community Foundation will create a written policy that clearly states how we present donors in any public arena.

We will work on new ways to recognize our volunteers, as well as provide feedback and evaluation.

At The Community Foundation, we are fortunate to work with more than 280 individual volunteers in a variety of ways. They lend their intellectual and human investments to our work, and we are greatly indebted to them. We recognize that we have an opportunity to strengthen these connections even further by not only ensuring they receive recognition, but by also providing a method of evaluation as well. We currently do not have the financial resources to create a volunteer recognition and evaluation program, but we will consider this a priority when resources increase.

We will continue to look for new ways to diversify our staff.

For each position created at The Community Foundation, we ensure the job opening is well publicized and promoted in a variety of ways and among peers in the field. While our majority female staff is typical of the nonprofit sector, we continually strive for a diverse staff that represents those we serve in our community.



community leaders at our Annual Meeting



Museum of Contemporary Art of Georgia

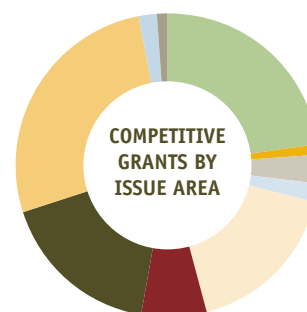
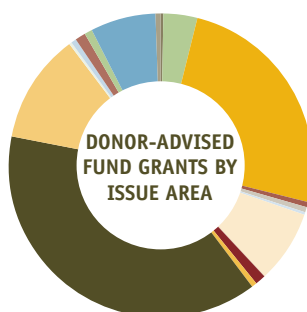
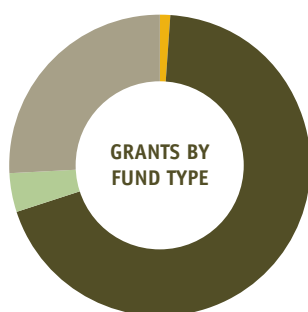
Grants & Support

In 2009 The Community Foundation and our donors gave more than \$140 million in grants toward non-profit organizations in our 23-county region and beyond – a record amount since our founding in 1951. We knew this was a critical year for individuals and families in our communities and the nonprofits that serve them. Our donors recognized that this was the time to increase their giving through us and regularly inquired about strong, effective nonprofits that were making an impact. Together, we invested in more than 2000 nonprofits that are making a difference.

The majority of grants given through The Community Foundation are through our donor-advised funds. We work directly with individual and family donors and help these philanthropists better understand the issues affecting our communities and the nonprofits making an impact on those issues. While nonprofits can not apply directly to donor-advised funds for potential grants, The Community Foundation continuously provides extensive information about strong nonprofits in our region and encourages investments from our donors.

Our multiple grantmaking programs offer various ways for nonprofits to apply for funding as well as management consulting support. To learn more about specific grantmaking programs and how to apply, please visit our website at www.cfgreateratlanta.org.

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Designated	26%
Total Common Good Funds	4%
Total Donor Advised	69%
Local Funds	1%

Animal-Related	0.3%
Arts, Culture and Humanities	3.8%
Civic	24.9%
Civil Rights Social Action and Advocacy	0.4%
Community Improvement and Capacity Building	0.7%
Diseases Disorders and Medical Disciplines	0.3%
Education	7.7%
Employment	0.1%
Environment	1.2%
Food Agriculture and Nutrition	0.5%
Health Care	38.2%
Housing and Shelter	0.2%
Human Services	11.5%
International Foreign Affairs and National Security	0.1%
Medical Research	0.1%
Mental Health and Crisis Intervention	0.5%
Philanthropy Voluntarism and Grantmaking Foundation	1.2%
Recreation and Sports	1.0%
Religion-related	6.7%
Youth Development	0.5%

Arts, Culture and Humanities	23.2%
Civic	1.0%
Community Improvement and Capacity Building	2.9%
Diseases Disorders and Medical Disciplines	2.5%
Education	16.9%
Environment	6.6%
Health Care	17.0%
Housing and Shelter	0.2%
Human Services	27.0%
Medical Research	0.2%
Mental Health and Crisis Intervention	1.9%
Youth Development	0.7%

[GRANTS & SUPPORT HIGHLIGHTS]

>> NEIGHBORHOOD FUND

Brentwood Neighborhood Association received a \$5,000 grant to implement several community beautification projects, as well as community coaching to strength its relationship with the City of Atlanta.

>> MORGAN FUND

The Ferst Foundation for Childhood Literacy received a \$2,330 grant to produce marketing materials to support its community outreach in local hospitals, the Health Department, as well as in preschools including Head Start. Children registered for the Ferst Foundation program receive a book at his/her home every month via U.S. mail until their fifth birthday.

>> COMMON GOOD FUNDS

Visiting Nurse Hospice Atlanta received a \$92,000 grant (two-year) to support its general operations. As the largest nonprofit home healthcare and hospice provider in Georgia, Visiting Nurse is dedicated to helping people manage their health and recover from illness in the comfort of their own home.

>> GRANTS TO GREEN

The Center for Pan Asian Community Services, Inc. received an Assessment Award valued at \$4,000 to determine areas for energy and water savings in a recently purchased building.

>> SCHOLARSHIPS

A \$5,000 scholarship from the Nancy Penn Lyons Scholarship Fund was given to a metro Atlanta student to help in her studies at the Massachusetts Institute of Technology.

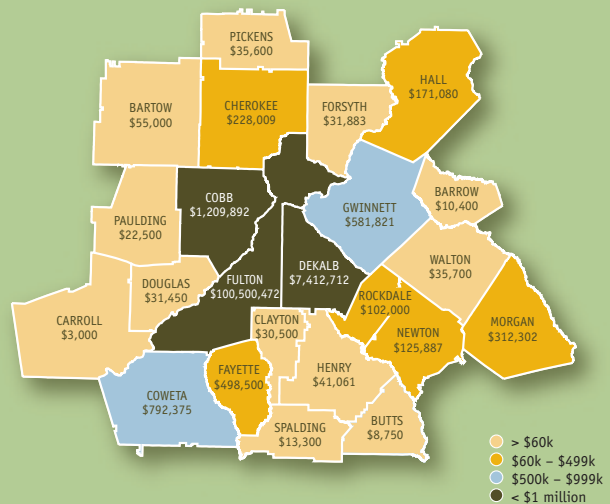
>> METROPOLITAN ATLANTA ARTS FUND

Quinlan Visual Arts Center received a \$40,000 grant to support its general operations. For the past 60 years, Quinlan has provided quality visual arts programming and educational opportunities in Northeast Georgia.

>> DONOR-ADVISED FUND

In light of the economic crisis, the Care-free Fund provided a \$25,000 grant to CredAbility to aid its work to financial counseling and debt management services.

GRANTS BY COUNTY



Giving

The Community Foundation works as a personal philanthropic advisor to more than 650 individual and family donors. We provide information about areas of interest, evaluations of nonprofit organizations and effective methods for grantmaking. By working directly with our donors, we are building and strengthening philanthropy throughout the region.

In 2009 The Community Foundation provided more than \$140 million in grants to nonprofit, faith-based and community-based organizations. An estimated \$95 million of that was through our donors and their donor-advised funds here at the Foundation. We thank our donors for their continued commitment to philanthropy, and we welcome our 40 new funds who joined us in 2009. To learn more about the ways we work with individual philanthropists, please visit our website at www.cfgreateratlanta.org.

WE WELCOME OUR 40 NEW FUNDS WHO JOINED US IN 2009

1972 Munich Olympic Massacre Remembrance Fund
Bay Foundation Fund
James E. Cox Medical Scholarship Fund
James E. Cox Childrens Healthcare Fund
Culbertson Fund
Darrell J. Dawson Family Fund
Charles and Marjorie Dobrovolny Fund
Extra Mile Fund
Finnernan Family Fund
Fraser Family Foundation Fund
G. V. W. Fund
Goodendorf Family Fund
Elizabeth S. Kelly Fund
Liberation Foundation Fund
LQM Fund
Maier & Berkele Foundation Fund
McCrimmon Family Fund
Milling Family Fund
Peter Moister Donor Advised Fund
Peggy B. and Dudley L. Moore, Jr. Family Fund
Ovie Mughelli Fund
Grace North Atlanta Church Fund
Edwin L. Quin Fund
David B. Quin Fund
Langdon B. Quin III and Caren R. Canier Family Fund
Katharine Rayner Fund for Animal Medical Center
Rockdale Fund
SafePath Children's Advocacy Center Fund
Shirley Franklin Legacy Fund
Shinglemill Fund
Social Enterprise Fund
Student Global Health Fund
Margaretta Taylor Saint Joseph's Hospital Fund
Margaretta Taylor PATH Foundation Fund
Margaretta Taylor Lovett School Fund
Margaretta Taylor High Museum of Art Fund
Margaretta Taylor Animal Medical Center Fund
Allen Thornell HIV Care and Service Fund
Clayton B. Wimberly Family Fund
James W. Wimberly, Jr. Family Fund

[GIVING HIGHLIGHTS]

>> CHARLES AND MARJORIE DOBROVOLNY FUND FOR THE CHURCH OF THE HOLY COMFORTER

The Community Foundation for Greater Atlanta was named as a partial beneficiary of two trusts upon the death of John Charles Dobrovolny, who passed away on August 22, 2009. The trusts were established by each of John's parents, Marjorie and Charles Dobrovolny, and were both structured to be terminated upon the death of the third of these three family members. As referenced in the wills of Marjorie and Charles, The Community Foundation would receive 10% of trust assets to be used "in support of Churches which have established programs promoting the participation of the mentally retarded in church activities."

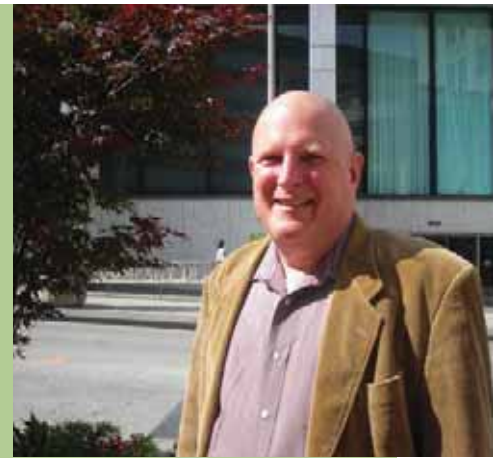
The Community Foundation's staff researched such programs at churches in the Metro Atlanta region, and identified one specific church, the Church of the Holy Comforter, which is part of the Episcopal Archdiocese of Atlanta, whose ministry and programs fit well with the Dobrovolny's intent. Specifically, 60% of the church's congregants are developmentally challenged. The church picks up residents of personal care homes three days a week – Sunday morning for services, Tuesday and Thursday for breakfast, programming and regular health screenings. Programs include the arts, gardening, music and movement as well as Bible study classes. Health support is provided through annual vision screenings and eyeglasses in partnership with GA Prevent Blindness, monthly Mobile Mercy stops, Emory student nurse visits and dental care through the Ben Massell Dental clinic.

The Foundation's staff felt strongly that establishment of a new fund to benefit the Church of the Holy Comforter is an appropriate use of the bequest funds per the

>> SHINGLEMILL FUND

John Shippee approached The Community Foundation in the spring of 2009 about setting up a donor-advised fund at the Foundation. John had been a long-time fundraiser for various nonprofit organizations in the Atlanta area, recently retired, and had been one of the beneficiaries of a family estate. John and his wife, Margaret Blevins, were not newcomers to philanthropy and had been supporting organizations doing work across the country and abroad. They felt The Community Foundation could be a good vehicle to deepen their connections with issues and causes in their local community and beyond, as well as to share information and insights with those who have similar commitments.

John and Margaret are focusing The Shinglemill Fund on giving that strengthens individual (mental, relational and spiritual), organizational (financial and capital) and community (environmental and cultural) assets of all kinds. Since their fund was established, John and Margaret have made numerous grants both locally and nationally, and The Community Foundation has recently invited John to become involved with the Foundation's Neighborhood Fund, which empowers local community members to improve their neighborhoods. As John and Margaret seek to explore and focus their own philanthropy, The Community Foundation looks forward to benefitting from their collective wisdom and experience.



>> FRASER FAMILY FOUNDATION FUND

The Fraser Family came to The Community Foundation to help simplify their philanthropy. The family has had a deep involvement in philanthropy supporting, through their family foundation, organizations that work in the areas of education, faith-based initiatives and the environment. The family was looking for a way to eliminate the time and expense associated with the legal and accounting requirements of a private foundation and streamline their giving to accommodate multiple generations and branches as the family continues to grow. They ultimately decided to open a donor-advised fund with the Foundation because of the ease, service and efficiency provided.

>> STUDENT GLOBAL HEALTH FUND

The Student Global Health Fund was started by Jeffrey Holzberg and his father, Mark Holzberg. A current medical student at Emory, Jeff participated in an internship at a hospital in India last year. He was so moved by the experience that he knew he wanted to give other medical students the opportunity to attend the same internship program in India. Jeff's parents decided to help him and together they put on a fundraiser among friends at their house to raise money. Much to their surprise they raised quite a bit more than expected and decided it would be better to put the money into a donor-advised fund. This way they have the option to recommend grants to the organization on an as-needed basis instead of giving it directly to the organization in India all at once.



Community Leadership

When we think of philanthropy, we often think of financial investments, but our human and intellectual investments are just as important. At The Community Foundation, these play a considerable role in our community leadership efforts. At times this leadership will take shape as a formal community initiative such as our Neighborhood Fund focused on empowering local community members, while other times it may be providing leadership by participating in shared learnings through Atlanta Place-Based Funders.

Our goal is the same – to work with other nonprofits, philanthropists and community leaders in our region to make a more significant impact together. We recognize that as a community foundation, we participate in a variety of undertakings to improve the Atlanta region’s quality of life. Whether that’s as a connecting point for giving or as a leader on a specific critical issue, we pull together the many assets in our communities to promote social change.

To learn more about our community leadership and our initiatives, please visit our website.

2009 VOLUNTEERS ON ADVISORY BOARDS

AIDS Fund	22
AIDS Leadership Team	12
Arts Fund	21
Arts Loan Fund	8
Champions for Children	10
Grants to Green	17
Healthy Belvedere	41
Clayton Fund	8
Fayette Fund	23
Morgan Fund	13
Newton Fund	12
Managing for Excellence	7
Neighborhood Fund	5
PG Advisory Board	19
Scholarships	79
TOTAL	297

>> **ATLANTA AIDS PARTNERSHIP FUND** – supports regional Atlanta’s HIV/AIDS advocacy, prevention education and service efforts through funding and leadership.

In February 2009 the Atlanta AIDS Fund and the newly formed Atlanta AIDS Partnership held a community update to share the AIDS Leadership Team’s vision and four strategies: 1) engage and develop faith-based leaders and institutions; 2) target high-prevalence communities for intensive prevention and treatment services; 3) enhance health and social service systems and build the capacity of AIDS service organizations; and 4) develop and implement an HIV/AIDS policy and advocacy agenda. In March, the AIDS Fund made grants of approximately \$300,000 to pilot these strategies.

>> **ATLANTA PLACE-BASED FUNDERS** – convened by The Community Foundation, the Atlanta Place-Based Funders is a learning and action group of funders committed to investing in specific communities in Atlanta.

>> **CHAMPIONS FOR CHILDREN WITH EXCEPTIONAL NEEDS** – provides support services for Georgia’s medically fragile and special needs children and their families.

>> **GRANTS TO GREEN** – provides environmentally focused knowledge and funding to strengthen nonprofits.

On March 11, Grants to Green held its first convening of “Green Champions” at program partner Southface’s downtown Atlanta office. More than 40 Champions gathered to network, discuss their sustainability efforts and hear from Grants to Green leadership about current happenings in the field. Green Champions are selected staff members at Grants to Green grantee organizations who help guide their organization’s green projects and who are responsible for making energy efficiency central to the organization’s mission and operations. By sharing experiences and ideas, the Champions learned from each other how to raise awareness and make energy efficiency central to their organization’s everyday life.





>> **HEALTHY BELVEDERE** – promotes healthy eating and active living through community-based and community driven strategies.

>> **HEALTH SAFETY NET** – aims to develop the capacity of an array of community-based service providers who provide free and affordable health services to under- and un-insured individuals.

>> **LOCAL FUNDS** – helps local community leaders with the Clayton Fund, Fayette Fund, Morgan Fund and Newtown Fund build their capacity to identify local issues and local assets which can combine with other resources to solve community problems.

In coordination with the Covington Montessori School, the Newton Fund was involved in a “Next Generation” philanthropic event with the Middle School Class at the school. The students raised \$500 which was then matched by the Newton Fund advisory board. The students selected four Newton-based nonprofits to visit and review for potential grants. After discussion as a group, the students awarded two grants: \$600 to the FFA/FHA Summer Wildlife Camp and \$400 to Prevent Child Abuse/Newton. The youth sponsored a grantee reception and shared the story with the local paper. The school and the Newton Fund advisory board hope to continue this event annually.

>> **MARSHALL MEMORIAL FELLOWSHIP** – offers emerging leaders ages 28-40, the opportunity to explore societies, institutions and people on the other side of the Atlantic.

>> **METROPOLITAN ATLANTA ARTS FUND** – supports and strengthens the 250+ small and medium-sized arts groups in the Atlanta area with an operating budget of less than \$2 million.

In November 2009 the Arts Fund, working together with the Atlanta Coalition of Performing Arts, the Metro Atlanta Arts & Culture Coalition, the City of Atlanta Office of Cultural Affairs and the Fulton County Arts Council, surveyed arts organizations in the region to determine the effect of the current economic crisis on arts organizations’ bottom lines and their ability to continue serving their audiences and patrons during and after the downturn. Top-line results showed more than half reported a decrease in total revenue as well as a decrease in single ticket sales. As a result, the Arts Fund hosted two groups of artistic/executive directors and board leaders to report on the results of the survey, present about scenario planning and talk openly about how organizations were experiencing and adapting to the economic crises.

>> **METROPOLITAN ATLANTA YOUTH OPPORTUNITIES INITIATIVE** – works to create better outcomes for youth transitioning out of foster care in metro Atlanta.

>> **NEIGHBORHOOD FUND** – empowers community members to positively impact neighborhoods at the local level.

>> **NEIGHBORHOOD NEXUS** – a comprehensive information resource that helps community leaders enhance quality of life through access to neighborhood level data.

Financial Overview

2009 proved to be a strong year for philanthropy in our region and for The Community Foundation for Greater Atlanta. In spite of the turbulent economic times, The Community Foundation and our donors gave a record amount in grants totaling more than \$140 million to nonprofits and faith-based organizations. Total gifts to The Community Foundation reached \$116 million, the Foundation's third highest year ever. And our total assets increased by approximately \$30 million. This increase, while partially offset by grant expense in excess of contributions, is primarily attributable to the investment income and returns which are reflective of the key tenets of the Foundation's investment philosophy:

Establish a strategic asset allocation, which is expected to achieve the portfolio's return objectives while also maximizing return for the level of risk assumed

Avoid the temptation to market time or broadly change strategy based on current conditions/near term outlook

Diversify the portfolio by asset class and strategy as this increases the likelihood of achieving return objectives under different economic/market conditions

2009 brought forth what can only be described as a shocking and breathtaking market rally. Due to the Foundation's ability to adhere to its investing principles, we were able to capture a large percentage of the market gains in a surprisingly rapid manner.

As a community foundation, one of our main roles is to be a trusted steward of assets for the region. With the capable oversight of our highly experienced Investment Committee, the Foundation will continue the important work of achieving the investment goals that are so critically important to the Foundation, our donors and the greater Atlanta community.

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Moving in the Spirit



Museum of Contemporary Art of Georgia

Investment Options

Foundation donors have the option of selecting from a variety of investment options. While the balances of these investment options are included in the financial highlights section of this report, an overview of these options are as follows:

>> AMERICAN FUNDS

A diversified portfolio of American Funds Mutual funds selected by the Investment Committee of the Foundation's Board and purchased without added investment manager commissions.

>> MONEY MARKET

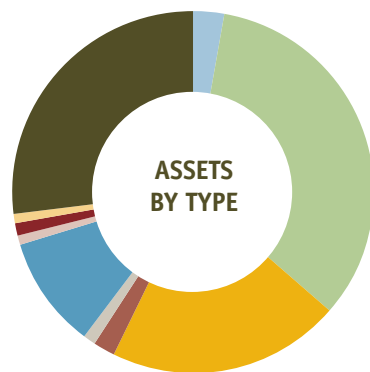
A standard money market fund that is appropriate for funds wishing to protect principal and avoid market risk while earning money market rates of return.

>> INDIVIDUALLY MANAGED

The Foundation permits donors with fund balances of \$250,000 or more to recommend the investment advisor of their choice to manage the assets in their funds in accordance with the Foundation's individually managed investment policy.

>> THE COMMUNITY FOUNDATION POOL

The Foundation pool is a diversified portfolio of assets invested broadly among institutional money managers. Managers are selected by the Investment Committee of Foundation's Board with the assistance of a neutral investment consultant.



Cash and cash equivalents	\$17,531,959	2.7%
Foundation Pool	221,759,009	34.1%
Individually Managed (including American Funds)	136,437,275	21.0%
Planned Gifts	10,606,574	1.6%
Privately Held Assets & Real Estate held as investment	4,476,885	0.7%
Short Term	67,422,131	10.4%
Stock Gifts Awaiting Sale	885,467	0.1%
Merrill Lynch Charitable Fund	3,326,754	0.5%
Bequests and notes receivable, net of allowance	2,894,262	0.4%
Real estate properties used in charitable activities net of accumulated depreciation	9,273,354	1.4%
Other assets	854,959	0.1%
Supporting Organizations	175,171,021	26.9%
Total assets	\$650,639,650	100.0%

GROWTH AND IMPACT OVER 5 YEARS

	2005	2006*	2007	2008	2009
assets	568,649,654	749,245,240	771,651,441	621,163,896	650,639,650
gifts	101,790,842	158,298,111	103,945,713	126,480,852	115,895,470
grants	49,737,760	113,155,153	74,491,445	96,121,637	142,126,513

*2006 numbers represent an 18-month fiscal year when The Community Foundation switched fiscal years from a June 30 end to a December 31 end.

Our Financial Summary

(unaudited)

THE COMMUNITY FOUNDATION FOR GREATER ATLANTA, INC.,
IT'S SUBSIDIARIES, AND SUPPORTING ORGANIZATIONS

CONSOLIDATED SUMMARY OF ACTIVITIES AND CHANGES IN ASSETS

Year Ended December 31

	2009	2008
Changes in net assets		
Revenue and support:		
Contributions	\$115,895,470	\$126,480,852
Interest, dividends, and other investment income	17,256,479	15,954,204
Income from rents	892,744	868,684
Special projects loss, net of expenses	(355,037)	(2,014,760)
Administrative fees	130,134	248,549
Net realized and unrealized gain/(loss) on investments	59,372,006	(169,483,707)
Change in value of split interest agreements	986,746	(2,350,837)
Total revenue and support	194,178,542	(30,297,015)
Expenses:		
Grants	142,126,513	96,121,637
Programs	6,984,649	7,290,371
Fund raising	239,432	292,609
General and administrative	4,649,472	6,528,173
Total expenses	154,000,066	110,232,790
Change in net assets	\$40,178,476	\$(140,529,805)
Net assets at January 1	584,343,940	724,873,745
Net assets at December 31	624,522,416	584,343,940

Note: The financial information above is unaudited and summarized for the annual report. Some accounts are summarized and unrestricted and temporarily restricted assets are not separately disclosed above.

A copy of our 2008 audited financial statements are currently available at www.cfgreateratlanta.org and our 2009 audited statements will be available at this web address in September of 2010.

BOARD OF DIRECTORS

Michael Kay, Board Chair

Kenneth L. Bernhardt, Georgia State University

Suzanne Boas, CredAbility

Kenneth Britt, Alston + Bird LLP (Retired)

Jeff Giglio, Inglett & Stubbs

D.R. Grimes, Community Volunteer

Deborah Hicks Ellis, Community Volunteer

John L. Hatfield, Hatfield Philips (Retired)

Bob Jimenez, Cox Enterprises, Inc.

Rev. Dr. James T. Laney, Emory University (Retired)

Bertram L. Levy, Arnall Golden Gregory

Steve Linowes, O8 Partners

Dr. David Satcher, Morehouse School of Medicine

Michael A. Nadal, Montag & Caldwell, Inc.

Beverly Daniel Tatum, Spelman College

Isaiah Tidwell, Wachovia Bank (Retired)

The Honorable Ronit Walker, State of Georgia

Jeannie B. Wright, Community Volunteer

Benjamin White, Legal Counsel, Alston & Bird

STAFF

OFFICE OF THE PRESIDENT

Alicia Philipp, President

Juanita Sheppard, Executive Assistant

PHILANTHROPIC SERVICES

Robert Smulian, Vice President of Philanthropic Services

Erin Drury, Philanthropic Advisor

Olen Earl, Director of Gift Planning

Angela Hunter, Philanthropic Services Associate

Audrey Jacobs, Director of The Center for Family Philanthropy

Barrett Coker Krise, Philanthropic Advisor

Wanda Wallace, Gifts Processing Coordinator

FINANCE & OPERATIONS

Christie Brown, Vice President of Finance & Operations

Antoinette Dowdy, Controller

Junior Francis, Investment Accountant

Walt Morrisette, Grants/Accounts Payable Accountant and Office Coordinator

Megan Swett, Director of Information Management

Ike Talabi, Assistant Controller

Vilma Weekes, Front Office Administrator/ Receptionist

COMMUNITY PARTNERSHIPS

Lesley Grady, Senior Vice President of Community Partnerships

Kimberly Austin, Program Associate

Sherrie Clark, Executive Assistant

Lisa Cremin, Director, Metropolitan Atlanta Arts Fund

Natasha Battle-Edwards, Grants Administrator

Lauren Hayes, Program Associate

Tyronda Minter, Director of Regional Impact

Kristina Morris, Program Associate

Kathy Palumbo, Director of Community Partnerships

Josh Phillipson, Program Associate

Lita Ugarte Pardi, Senior Program Officer

Tene Traylor, Program Officer

MARKETING & COMMUNICATIONS

Lauren Norton Welsh, Vice President of Marketing & Communications

Tieler Giles, Communications Associate

The Community Foundation
FOR GREATER ATLANTA

50 Hurt Plaza
Suite 449
Atlanta, GA 30303